STATE OF IDAHO DEPARTMENT OF LANDS



CONSTRUCTION MANAGEMENT GENERAL SERVICES

REQUEST FOR QUALIFICATIONS 09-411

REQUEST FOR QUALIFICATIONS AND INSTRUCTIONS

Statements of Qualifications will be received by the Idaho Department of Lands for the following:

To provide professional construction management services to the Idaho Department of Lands and represent the Agency's interests in having the project(s) designed for operating efficiency, completed on-time, within budget, and as planned.

STATEMENT OF QUALIFICATIONS DEADLINE AND DELIVERY REQUIREMENTS

Statement of Qualifications must be received by the Idaho Department of Lands at 300 N 6th St Suite 103, Boise, Idaho, 83720 by 3:00 PM M.D.T. June 26th, 2009. The Department of Lands is not responsible for lost or undelivered Statement of Qualifications or for failure of the United States Postal Service or the Idaho State Capital Mall Central Mail Room to deliver Statement of Qualifications to the Idaho Department of Lands by the deadline. Late Statement of Qualifications will not be accepted. Faxed Statement of Qualifications will not be accepted.

Delivery Address:

Idaho Department of Lands ATTN: Tony Pirc 300 N. 6th St Suite 103 Boise, ID 83720

Statements of Qualifications are to be mailed in a sealed envelope and are to be marked in the lower left hand corner with the following information:

Statement of Qualifications for: 09-411 Construction Manager Services

Request for Qualifications Close: 6/26/09 at 3 P.M. M.D.T.

A Statement of Qualifications submitted using "Express/Overnight" services must be shipped in a separate sealed inner envelope identified as stated above and enclosed inside the "Express/Overnight" shipping envelope.

QUESTIONS

Further information is available by contacting Tony Pirc, Purchasing Agent, at (208) 334-0256 or by email at tpirc@idl.idaho.gov.

INTRODUCTION

The Idaho Department of Lands [IDL] is seeking qualified firms to submit a Statement of Qualifications demonstrating the ability to provide professional Construction Management services to the Idaho Department of Lands and represent the Agency's interests in having the projects completed on-time, within budget, and as planned. Construction Manager Services will vary greatly with the selected projects.

Firms are expected to have the expertise necessary to perform the duties described hereafter. IDL's primary goal is to provide long-term, sustainable revenue to the Beneficiary groups that directly benefit from the Endowment assets within the State of Idaho. The goal of this Request for Qualifications is to develop a list of qualified construction managers on whom the agency can call to work in conjunction with architects, engineers, and agency personnel to oversee the completion of these projects.

IDL hereby requests Statement of Qualifications from firms who are interested in providing professional Construction Management Services for the Idaho State Board of Land Commissioners [Land Board].

BACKGROUND

When Idaho was admitted to the Union as the 43rd State in 1890, it was granted approximately 3,672,000 acres of land for the support of State institutions. The land was granted under the condition that it be managed in perpetuity as a trust for the beneficiary institutions. This mandate was codified in Article IX Section 8 of the Idaho Constitution, which states that the lands are to be managed, "...in such manner as will secure the maximum long term financial return to the institution to which granted." Chief among the beneficiaries are the public schools, which received two sections of every township in the State (1/18 of the total land base). Other institutions include the University of Idaho, the Agricultural College, the Normal Schools, Penitentiary, Charitable Institutions, State Hospital South, School of Science and Capitol (formerly Public Buildings).

Management activities on State Endowment Trust Land are not intended to benefit the general public, but are directed solely to the good of the beneficiaries of the original land grants. Revenue generated from the management of these lands is deposited into the earnings reserve fund from which the costs of management and payments to the beneficiaries are made. Revenue from mineral royalties is deposited into the permanent endowment fund. Both the earnings reserve and permanent fund are invested by the Endowment Fund Investment Board. The investment return is distributed to the beneficiaries. Land sale revenue is deposited into the land bank and is available to purchase other land. If not expended for that purpose within five years, the land sale revenue is deposited into the permanent fund.

Management of endowment trust lands is entrusted to the State Board of Land Commissioners. The Idaho Department of Lands is the administrative arm of the Board and carries out the executive directives of the Board to meet the constitutional trust mandate.

The following is an excerpt from the *State Trust Lands Asset Management Plan* adopted by the Idaho State Board of Land Commissioners [Land Board]. This plan provides the foundation for the Idaho Department of Lands, on behalf of the Land Board, to make management decisions for the Endowment Trust lands within the State of Idaho.

"Endowment assets of the State of Idaho consist of both land and funds. All endowment assets are held in trust by the State in nine endowment trusts. The State initially received grants of over 3.65 million acres of land in trust from the federal government in the Idaho Admissions Bill and through other federal acts. Over time, properties were sold or exchanged, with proceeds from the sales and certain other income deposited in the endowment funds.

The State Constitution establishes the State Board of Land Commissioners (Land Board) as the trustee over the assets of the nine endowments. As trust manager, the Land Board is obligated to manage the assets of each trust with undivided loyalty to the beneficiaries of the trusts. Idaho Code 58-101 created the Idaho Department of Lands (IDL) to serve as the manager of the non-financial assets of each trust on behalf of the Land Board. Similarly, Idaho Code 57-718 created the Endowment Fund Investment Board (EFIB) which formulates policy for, and manages the investment of, the financial assets.

Mission

All endowment assets of the State of Idaho must, per the State Constitution, be managed "in such manner as will secure the maximum long term financial return" to the trust beneficiaries. The assets will be managed to provide a perpetual stream of income to the beneficiaries by:

- Maximizing long-term financial return at a prudent level of risk,
- Protecting future generations' purchasing power, and

Providing a relatively stable and predictable payout

Asset Management Philosophy

To fulfill its fiduciary duties to each individual endowment, the State of Idaho will:

- Manage the endowed land and financial assets as a whole trust on a total return basis.
- Seek to optimize risk and return from both the endowments' land and financial assets through diversification of holdings.
- Ensure that significant land holdings will be maintained in perpetuity, since they provide material diversification and inflation protection to an endowment's portfolio.
- Seek to reposition parcels to reduce risk, lower management costs and increase prospects for immediate and sustainable income, recognizing that much endowment land remains in the original scattered parcels obtained from the federal government.
- Provide for the appropriate and reasonable management expenses of each endowment from its own income.
- Accommodate public use of endowment lands, to the extent feasible, provided such use does not impair financial returns.

Performance Objectives

- Over time, ensure real returns for each endowment (after inflation and net of management expenses) perform at or above median compared to relevant peers.
- Assets will be grouped into classifications of similar character to facilitate performance monitoring and analyses of portfolio diversification and risk. Each asset class will have a targeted rate of return and is expected to perform at or above median compared to relevant peers.
- Over time, the return of land assets should compete favorably with the return of financial assets. Where
 determination of land value is problematic, performance will also be measured by discounting expected
 net cash flows.

Protection of Principal

- Proceeds from the sale of endowment lands will never be distributed, but must be reinvested in land within five years or transferred to the permanent endowment funds.
- Proceeds from extracted mineral resources will never be distributed but must be deposited to the permanent endowment funds.
- The principal of the permanent endowment funds, adjusted for inflation, will never be distributed, to protect the future purchasing power of the beneficiaries.

Distributions to Beneficiaries

- Renewable income from the land assets as well as cash income and capital gains above inflation from the permanent endowment funds will be deposited in the Earnings Reserve accounts.
- The Earnings Reserve accounts should buffer fluctuations in revenues to provide stable and predictable
 payouts to the beneficiaries. If an endowment's Earnings Reserve account falls to zero, distributions
 must stop.
- Long-term spending policy and annual distributions are recommended by the EFIB and approved by the Land Board. The Legislature considers the approved distributions in setting annual appropriations for the beneficiaries. The Legislature also appropriates the operating budgets for the IDL and the EFIB from the Earnings Reserve accounts."

SCOPE OF SERVICES

The Idaho Department of Lands, in accordance with Idaho Code 67-2320, is requesting "Statement of Qualifications" (SOQ) from qualified Construction Managers to provide professional construction management services to the agency.

It is anticipated that construction management service providers selected by this RFQ process will be utilized for projects where:

- 1. The individual project fee may exceed the sum of twenty-five thousand dollars (\$25,000.00).
- 2. The individual project fee may be less than twenty-five thousand dollars (\$25,000.00).

The Idaho Department of Lands reserves the right to at any time issue an individual project RFQ that falls within the scope of work parameters of this Construction Management Services RFQ without prejudice to the Construction Management service providers selected under this RFQ.

The successful construction management firms selected through the Idaho Department of Lands effort by this RFQ will provide services for a varied nature of on-going maintenance, system renewals, and capital improvement. Construction Management is considered a viable delivery system for selected projects. All IDL projects will be evaluated as to the appropriate delivery system to meet the agency's needs.

The Idaho Department of Lands is soliciting proposals from qualified Construction Management firms for assistance in new construction and remodeling projects over a five (5) year period which may include the following:

- Construction, renovation, and replacement of various systems in existing commercial office and retail buildings. It should be understood that the work scope may occur in occupied commercial buildings. The construction needs to be coordinated with appropriate phasing that satisfies the needs of the lessees.
- 2. Major repairs to facilities may include, but are not limited to, replacement of HVAC systems, glazing, roofing, interior finishes, carpeting, paving, and general site improvements.
- 3. Evaluation and cost estimation of future projects.

The goal of this RFP is to develop a list of qualified construction managers on whom the agency can call to work in conjunction with architects, engineers and agency personnel to oversee the completion of these projects.

PURPOSE OF PROCEDURE

The Idaho Department of Lands "Qualification Based Selection" (QBS) is to comply with Idaho Code 67-2320. This procedure provides for an orderly process of:

- 1. Solicitation of professional qualifications
- 2. Evaluation and ranking of qualifications
- 3. Establishment of a ranked list of service providers
- 4. Negotiation of scope of services and fees

SOLICITATION CYCLE

It is anticipated that the solicitation cycle for RFQ 09-411 shall be in force until July 23, 2014. The Idaho Department of Lands reserves the right to award future projects based upon prototypical designs to the Construction Mangers selected by this RFQ, if deemed to be in the best interest of the Idaho Department of Lands. Solicitations by RFQ for "Statements of Qualifications" (SOQ) from applicants who desire to provide professional construction management services will be made periodically hereafter at a time to meet the Idaho Department of Lands needs. Ranking of submittals, creation of service provider shortlist and applicant notification of ranking shall be determined within 60 calendar days of the RFQ due date.

REQUIRED SERVICES

CONSTRUCTION MANAGEMENT GENERAL SERVICES

Throughout all phases of the project, the Construction Manager is expected to provide professional construction management services to the Idaho Department of Lands and represent the Agency's interests in having the project designed for operating efficiency, completed on-time, within budget, and as planned. Construction Manager Services will vary greatly with the selected projects. However, the following list is provided to indicate the anticipated list of services that may be applicable

1. DESIGN PHASE

- 1.1. In conjunction with the Project Architect, Engineers, Agency staff, and their Property Management firm, develop a comprehensive management plan to include an efficient, effective, non-duplicating set of procedures, responsibilities and contracting strategy for overall project administration and contract compliance.
- 1.2. Works with the Architect, Engineers and Agency staff to provide accurate and complete cost information and assist in the evaluation of energy modeling scenarios and long term performance of the commercial buildings.
- 1.3. Assist in establishing a detailed scope of work to include all project costs.
- 1.4. Based upon agreed scope of work, evaluate existing project budget and make recommendations to the Idaho Department of Lands as necessary.
- 1.5. Assist in the acquisition of all necessary agency reviews, approvals and permits.
- 1.6. Develop combined or sequential bidding documents for contractors and vendors.
- 1.7. Develop and maintain critical path schedule and responsibilities for all phases of the project and monitor participants' compliance.
- 1.8. Suggest value engineering options and ideas where cost and timesaving might be achieved.
- 1.9. Construction Manager will not be required to identify, order, or coordinate delivery of Agency or Lessee's furnished furniture, fixtures or equipment.

2. BIDDING PHASE

- 2.1. Develop bidding strategy and assist in evaluating bids for compliance with project requirements and documents.
- 2.2. Identify those bid packages which are in excess of the project budget and assist in working with possible bidders to identify cost saving opportunities, alternate methods, duplications, omissions, etc.
- 2.3. Verify correct licensure of contractors and sub contractors.
- 2.4. Make recommendations to the Agency for the award of bid packages to the lowest responsive and responsible bidder.
- 2.5. The Construction Manager will assist in developing bidder lists, contractor pre-qualification (if utilized), distribution and tracking of bid documents, management and return (if necessary) of bid security, payment and performance bonds and will work with the Agency in advertisement and receipt of bids.

3. CONSTRUCTION PHASE

- 3.1. Conduct pre-construction meetings with the assistance of the Project Architect, Engineers, Agency, and Property Management firm.
- 3.2. Initiate construction activities and provide necessary Division 1 General Conditions services such as project supervision, office trailers: telephones, toilets, temporary utilities, site cleanup, etc.
- 3.3. Assume overall responsibility for project safety, administration and scheduling of subcontractors, quality assurance and inspection responsibilities.
- 3.4. Maintain cost control records and monitor costs to assure compliance with project budget.

4. PROJECT COMMISSIONING

- 4.1. Develop a schedule for occupancy by lessees upon completion of work.
- 4.2. Assist the Idaho Department of Lands and Architect in final inspection and acceptance of project. Obtain and verify all occupancy certificates, project guarantees, as-built drawings, manuals, etc.
- 4.3. Assist in the training of Property Management and/or the Idaho Department of Lands personnel provided by contractors and vendors.
- 4.4. Assist the Idaho Department of Lands and their Property Management firm in the management of compliance with all warranties for the one (1) year period after substantial completion.

PROPOSAL CONTENT AND FORMAT

It is essential that the Agency be able to easily match a vendor's response with this RFP's requirements for information. This RFP and its format should be incorporated into the actual response. Where asked, indicate compliance and/or note any exceptions to the requirements and provide responses to any questions that follow. The original and four (4) printed versions of the proposals must be submitted on 8½ by 11-inch paper in standard three-ring binders. Please include a thumb drive copy or CD ROM (in MS Word or Rich Text Format) of your proposal along with the printed copies. Foldouts for charts, tables, spreadsheets, and single-line diagrams are acceptable. Pre-printed materials, such as brochures or technical documents, may be included, but whenever possible should be placed within the three-ring binders. Submittals not provided in the following format will complicate the evaluation and comparison process and may therefore be declared non-responsive.

The proposal must be organized in sections containing the numbered sections below:

1. Cover Letter Mandatory

2. Construction Manager Information Form Mandatory

3. Completed Company Profile 250 Points

Describe your firm's history, size, resources, philosophy of service, volume of work, financial stability and construction management techniques and methods along with any other information that would be helpful to characterize the firm.

4. Project Approach and Fees

400 Points

Describe your approach to providing the service outlined in "Required Services". Discuss how you provide leadership to facilitate teamwork and communication among all parties. Provide a professional resume for each key person proposed to be assigned to this project. Describe the proposed roles and responsibilities of key personnel on this project. Identify a proposed project manager who would be responsible for the day-to-day management of project tasks and be the Idaho Department of Lands' primary point of contact with your firm. Include an organizational chart of the proposed project team. Provide information relative to how you develop fees for Construction Management services. Provide a schedule of hourly rates for all Construction Management related services you can provide the Idaho Department of Lands.

5. Experience 250 Points

Briefly describe other projects executed by your firm that demonstrate relevant experience. Extensive descriptions of vaguely related projects are discouraged. List all projects for which you have performed similar work in the past five years; please identify those performed for public agencies. For each project listed, include the name, title, address, phone number and email address of a person who may be contacted regarding your performance on the project. Projects listed for which your firm worked in an auxiliary capacity or in a venture or partnership should include the name, title, address, phone number, email address and a contact person of the lead firm.

6. Additional Considerations

100 Points

Clarity, completeness and quality of submission.

SELECTION PROCESS

Proposals will be ranked on qualifications and the Idaho Department of Lands may choose to interview several of the top ranked firms. However, at its discretion, The Idaho Department of Lands may dispense with interviews and select a firm to perform the work.

Selected references will be contacted.

A selection committee appointed by the Idaho Department of Lands will assist with evaluation of submittals and make recommendations to the agency's Purchasing Agent who will make the final selection. The Idaho Department of Lands will seek to negotiate a contract, a detailed scope of work, fee schedule, etc. with the selected firms.

The Idaho Department of Lands expects to evaluate proposals and provide written notification of the short-listed firms within 30 days of receipt of submittals. If interviews are held, they will be scheduled within three (3) weeks of short-list notification.

PROPOSAL GUIDELINES

- 1. The Agency will not be liable for any costs incurred in the preparation and production of a proposal, or any work performed prior to the execution of a contract.
- 2. All proposals and other materials will become the property of the Agency.
- 3. All information contained in this RFQ and acceptable provisions of the selected firm's response will be made a part of the executed agreement for services.
- 4. Upon request, the submitting firm shall submit additional information as requested by the Agency.
- 5. The Agency reserves the right to:
 - Waive any informalities or irregularities and reject any or all proposals received as a result of this RFQ
 - Select all or part of the respondent's proposal
 - Negotiate changes in the scope of work or services to be provided
 - Conduct investigations required to determine the submitting firm's performance record and ability to perform the assignments specified as a part of this RFQ
 - Negotiate separately with any source in a manner deemed to be in the best interests of the Agency
- 6. If, through any cause, the contracted firm shall fail to fulfill in a timely and proper manner its obligations under this agreement, or if the firm shall violate any covenants, terms, or conditions of the agreement, then the Agency can cancel the contract without prejudice by giving at least five (5) days prior written notice to the firm of such termination.

CONSTRUCTION MANAGER INFORMATION FORM (Mandatory) 09-411

| 1. | Name of firm, address, and telephone nu | nber of your firm's main office: |
|-----------|---|---|
| | Firm | |
| | Address City, State, Zip | |
| | Telephone Email: | |
| 2. | | er of the firm's officer responsible to the Agency for all work to be provided under this |
| | Name/Title Address | |
| | City, State, Zip Telephone Email: | |
| | | |
| 3. | Please check the appropriate box to ider [] Corporation [] Partnership [] Indi | |
| 4. | If a Joint Venture, please attach a separa | e sheet identifying other firm(s) in association. |
| 5. rea | If yes to any of the following questions, please attach a separate sheet of explanations; state the project(s), date, owner and ason. | |
| | Has your firm or joint venture failed to acc | ept a contract or to complete a contract awarded to you? |
| | Has your firm or joint venture under anot | er or previous name failed to accept a contract or to complete a contract awarded to you? |
| | Has your firm or Joint Venture had a contr termination? []Yes []No | ct terminated or been given written notice or demand incident to a proposed contract |
| 6. | State the name, agent's name, address, used by your firm during the past five (5) | elephone number of your current bonding company(s) and identify any other sureties ears. |
| | Name | |
| | Address City, State, Zip | |
| | Telephone | |
| 7. | State the name, agent's name address, and telephone number of your current insurance company(s) that provides or during the past five (5) years have provided coverage for your firm in the areas of liability, builder's risk and workers' compensation. | |
| | Name | |
| | Address City, State, Zip | |
| | Telephone | |
| 8. | If yes to any of the following questions, provide complete explanation on a separate sheet. | |
| | Has any one of your current or former sureties or bonding companies ever been required to perform under or canceled a bid bond, labor or material payment bond or a performance bond issued on your firm's behalf? [] Yes [] No | |
| | Has you firm ever been denied coverage so, please state the company, date and r [] Yes [] No | or had coverage terminated or cancelled by any insurer during the past five (5) years? If ason. |
| | Within the past five (5) years has your cur bankruptcy, litigation or arbitration? [] Yes [] No | ent firm or any predecessor organization been involved as a party or filed a claim in any |
| 9. | Name, title and signature of your firm's officer from No. 2 above who was responsible for the preparation of this form. | |
| | Name: | Email: |
| | Signature: | Title: |